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MARCH 1985, VOL. 20, NO. 3

William Claggett,
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# FUTURES

## Gauging social effect of working women

The working woman and her needs have been under the lens of sociologists, economists and market researchers with alarming frequency recently. Latest on the lists of studies is a poll conducted by R.H. Bruskin, the New Brunswick, N.J., market research firm, studying the effect the growing working woman population has had on the quality of life. Based on a national sample of 1,000 men and women, the working woman is having the greatest positive effect on "buying better goods and services," and the most negative influence on the "manners and discipline of children."

Woman rate their economic value slightly more highly than men do: about 84% of women believe working women increase the nation's interest in buying better *and* more goods and services, compared to 76% of men sampled. The effect on personal relations seems a greater matter of controversy — only half the women polled believe that women who work tend to have better relationships with friends and neighbors, and their spouses. Men tend to be even less positive. 47% of those polled said that women who work outside the home have improved relationships with friends and neighbors, while 46% believed it helped the marriage.

But the most interesting appraisal is of the way children are being raised. Working women seem to be having a

**WORKING WOMEN AND THE QUALITY OF LIFE**

| | TOTAL | | | | MEN | | | | WOMEN | | | |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| | POSITIVE | NEGATIVE | NO EFFECT/ DON'T KNOW | NO MORE NEGATIVE DIFFERENCE | POS. | NEG. | NO EFFECT/ DON'T KNOW | POS. NEG. DIFF. | POS. | NEG. | NO EFFECT/ DON'T KNOW | POS. NEG. DIFF. |
| | 76 | 16 | 8 | | 76 | 21 | 11 | | 84 | 11 | 5 | |
| INTEREST IN BUYING BETTER GOODS AND | 86 | 3 | 6 | 83 | 79 | 7 | 7 | 72 | 93 | 1 | 4 | 92 |
| INTEREST IN MORE GOODS AND | 84 | 3 | 9 | 81 | 76 | 7 | 11 | 69 | 91 | 1 | 6 | 90 |
| QUALITY OF OUR COUNTRY | 77 | 8 | 11 | 69 | 71 | 9 | 9 | 62 | 83 | 6 | 10 | 77 |
| APPEARANCE OF TOWNS | 62 | 25 | 9 | 37 | 57 | 31 | 11 | 26 | 67 | 19 | 6 | 48 |
| RELATIONS WITH FRIENDS AND | 49 | 22 | 28 | 27 | 42 | 23 | 32 | 19 | 56 | 21 | 23 | 35 |
| PERSONAL RELATIONS OF MARRIED | 47 | 27 | 25 | 20 | 46 | 30 | 23 | 16 | 48 | 24 | 28 | 24 |
| THE WAY WE RAISE | 47 | 41 | 9 | 6 | 42 | 46 | 9 | 4 | 52 | 36 | 9 | 16 |
| DISCIPLINE OF | 34 | 49 | 16 | (15) | 37 | 51 | 12 | (14) | 31 | 47 | 19 | (16) |

Source: R.H. Bruskin Associates, Market Research

recognized impact on the household's economy but to the detriment of children's behavior — fewer adults found a negative impact (43%) overall, than when questioned about children's manners specifically (46%). In a similar pattern, evident throughout the study, women have a greater tendency to rate their impact positively than men do. For example, 46% of women cite a positive effect on the way children are being brought up, compared with a scant 37% of men.

## Demand for convenience crosses the Atlantic

Europeans are increasing their demand for fast food, convenience foods, frozen meals and snacks, according to a study by Frost & Sullivan, the New York-based market research firm. Europe is affected by the same demographic trend sweeping the U.S.: "a static but aging population" coupled with "an increase in the number of one- and two-person size households." At the same time, the number of retail outlets is declining, as traditional food shops, such as bakers, butchers and fish stores, are replaced by larger, convenience-oriented supermarkets.

The report — which tracks trends in England, West Germany, Holland, Belgium, Switzerland, France and Italy — predicts a boom in new product introductions, in such areas as frozen desserts, snacks, and cold drinks. The same emphasis on leisure time that is gripping the U.S., predicts the study, is sweeping Europe, promising a boom of instant meals and soups, among other relatively new product categories.

Yet the failure rate in Europe could very well exceed the U.S., where about 80% of new products fail: Out of an estimated 10,000 launches in the seven national markets, "somewhere around 3% are commercially successful," according to the report. The calculation is based on previous studies in the U.K.

## Long-term media outlook

A recent study by D'Arcy MacManus Masius takes a long-term look at media inflation. Using 1984 prices as the index and 1989 as the not-too-distant horizon, director of media services, Joseph P. Zeller, projects average annual increases between 5% and 12%. The notable exceptions are, as expected, prime time and early news on network television, which Zeller predicts will increase at 15.4% and 15.6%. The cost increases are on a CPM basis.

The forecast, which assumes an annual inflation rate (CPI index) of 6% in 1984, 8% in 1985, and 5% for 1986-1989, breaks cost trends by daypart for network television and radio. Zeller points out that the adult population (+18 years old) will grow 7.4% in the next five years, from 167.71 million to 180.18 million. At the same time, the number of television households will grow at the slightly faster rate of 7.9% — to 91 million from a current 84.3 million. Despite this, Zeller projects a continued erosion of network television audience, which he attributes primarily to pay cable, advertiser-supported cable and independent stations.

Since the forecasts are based on historical data, the study does not include cable television trends. Unit costs and CPMs, Zeller points out, are being directly affected by uncertain factors such as increasing subscription and programing costs, so the report deliberately excludes measurement of "this ever-changing medium." Cautiously pegging the growth of cable at 60% by the end of the decade, DMM believes that the number of channel options and "the definite lack of quality programing" will continue to favor advertisers who depend on network television as their primary medium.

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# UPDATE

## Setting the record straight

In our January story on a computerized approach to planning and newspaper space ("A Shortcut for Newspaper Buying"), we neglected to mention that in addition to Doyle Dane Bernbach and sales reps Story & Kelly-Smith and Sawyer Ferguson Walker, Gannett Media Sales and Knight-Ridder Newspaper Sales are members of the consortium. Knight-Ridder, which has been with the service from inception, provided the data base and financial assistance to the project, as did Story & Kelly-Smith. Gannett and Sawyer Ferguson Walker joined in 1984 to help provide quarterly updates of the data base. The rep firms were enlisted to aid in compiling the data base while DDB developed programing for the system.

The data, which includes ABC circulation figures and pricing, was made available for the top 50 markets in April, 1984, and covers 850+ newspaper publishing companies. The data for all 210 ADI's was made available in early January. Because of the involvement of the time-sharing companies IMS and Telmar, the data will be broken out by DMA as well as ADI. To be included in the data base, a newspaper must have at least 1% household penetration (or coverage) of the ADI and 10,000 circulation, or a total of 25,000 circulation. In the initial test, the preparation of the list and the compilation of circulation and cost data was reduced from 35 to three hours. The system, designed in part to supply more detailed research and qualitative data, also included the SRDS 8-digit media code as part of its data base.

The consortium is making the service available to ad agencies, charging no fee through June 30, 1985; however, there is the on-line charge of the time-sharing companies.

## Licensed products pass $40 billion mark

Licensing was big business in 1984, with the year posting out at an estimated $40.1 billion worth of retail sales on licensed products. (See *Marketers take license*, September 1984, pg. 72.)

The gains, too, reflect growth "right across the board," notes Arnold Bolka, The Licensing Letter's publisher. Bolka, who believes that licensed merchandising will be "the marketing pizazz of the 80's," foresees growth at a rate that will elevate retail sales of these items well beyond the $75 billion mark in the next five years.

**Licensed product sales, 1984**

| Category | % of Total Sales | $ (billions) |
|---|---|---|
| Apparel/Accessories | 38% | 15.238 |
| Computer/Video Programs | 1% | 0.401 |
| Foods/Beverages | 5% | 2.005 |
| Gifts/Novelties | 11% | 4.411 |
| Health & Beauty Aids | 3% | 1.203 |
| Home Furnishings/Housewares | 7% | 2.807 |
| Publishing/Stationery | 12% | 4.812 |
| Sporting Goods | 2% | 0.802 |
| Toys/Games | 19% | 7.619 |
| Miscellaneous | 2% | 0.802 |

That's the news from The Licensing Letter, which reports that sales in 1984 represented a 50% increase in sales over 1983 expenditures. In fact, 1984 was the seventh consecutive year of vigorous growth for the industry.

The Licensing Letter's survey breaks out licensed product sales over nine major categories (see chart).

## In-store couponers go bananas

Another in-store coupon distributor has entered the supermarket fray. (See *Coupons go in-store*, November 1984, pg. 78.) Last month a new program called ACTNOW kicked off in 26 major markets, distributing booklets of manufacturers' coupons to shoppers as they entered the supermarket.

ACTNOW uses uniformed representatives to hand out the coupon booklets to customers, as opposed to some of the other services like The Coupon Counter which distributes coupons via machine. In the two weeks of its February coupon drop, ACTNOW distributed 10 million coupon books in 5,000 supermarkets, representing more than 125 major food chains. In May, ACTNOW will conduct its next drop, with three more drops to follow during the year. ACTNOW has attracted some leading food and package goods manufacturers, among them General Mills, Nestle, Quaker Oats, Nabisco, Kimberly Clark and Coca-Cola.

Meanwhile, The Coupon Counter will be expanding into 55 markets by

Continued on page 42

# The greening of the maturity market

**You remember the "Me" Generation that turned into the "We" Generation. Well, get ready for "US" time. The Ultimate Society — those over age 55 — are active, affluent and outpacing younger counterparts both in numbers and opportunities.**

Move over, baby boomers. It's time to pay a little respect to your elders.

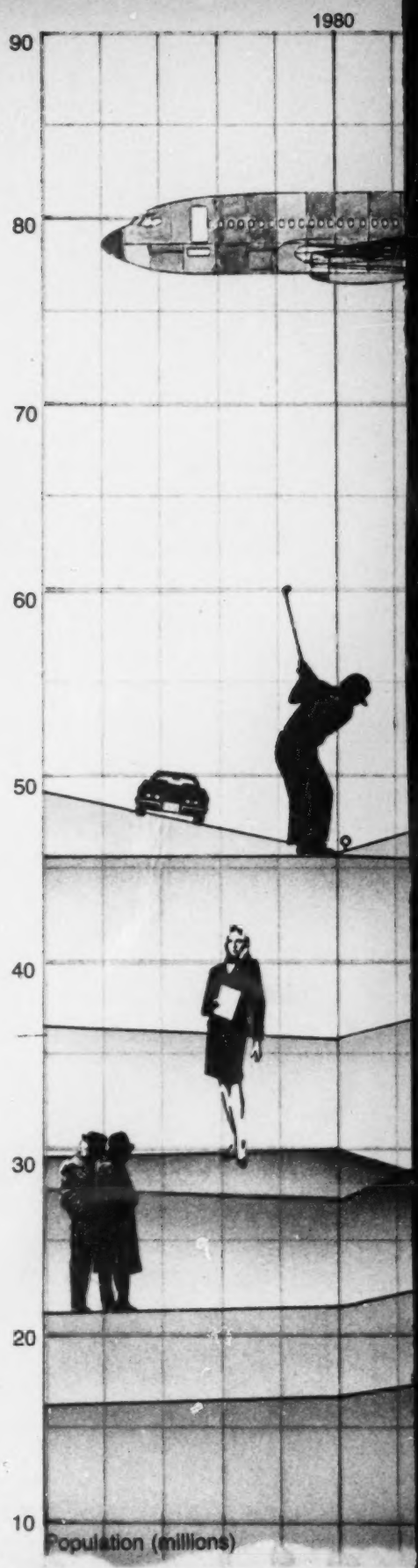
In marketing departments everywhere, researchers are hailing the over-55 age group as the "new" target generation. And the reason is obvious to anyone who looks at this group's vital statistics. The 55-plus age group currently numbers about 48.3 million people, or 21% of the population. By the year 2000, one out of four Americans will be in this group, and that's when the real growth will begin. As the baby boomers cross the 55-year-old age line beginning in 2001, the category is expected to grow by 23% in the next century's first decade, followed by a 6.8% jump from 2010 to 2020. Is it any wonder that "old" is "in" with marketers?

More significant than the numbers, however, are the changing lifestyles of this age segment. Armed with lots of disposable income, and sensibilities formed by society's premium on health and fitness as well as self-gratification, this Ultimate Society is insulted by old-age stereotypes that are quickly becoming outdated. Today's grandma is more likely to be found perched on the porch of her Florida condo, walking the deck of a transatlantic cruise, or doing time on her Exercycle than watching the sunset from a rocking chair.

Norman Goldstein, the director of marketing services at Jordan, Case & McGrath, believes that the stereotype of the feeble-minded elderly is breaking down so fast that the over-55 group should not be segregated in marketer's plans by age differences alone. "Today's 55-plus population is much more willing to experiment than their predecessors of a decade or two ago. There's a continuation of their lifestyle as they get into this age bracket. Age is relatively uneventful for the vast majority."

Older Americans as a group are not homogeneous, continues Rena Bartos, senior vice president at J. Walter Thompson. Bartos breaks the market into six groups: active affluents, homemakers, active retireds, disadvantaged, all other, and the ill of health. More than 80% of the older market identified by Bartos falls into the first three break-

Continued on page 75



1990
2000
2010
2020
55+
5-17
25-34
35-44
45-54
18-24
Under 5
Colos

# A statistical look at Americans 55-plus

*The following is a statistical profile of the current 55-plus market. Experts agree, however, that this profile will undergo rapid change in years to come as today's lifestyles set the tone for tomorrow's retirements.*

The 55-plus age group is comprised of 45.3 million people, with about 7 million more women than men. This group includes 43.1 million whites, 4.5 million blacks, and 2 million people who speak Spanish at home.

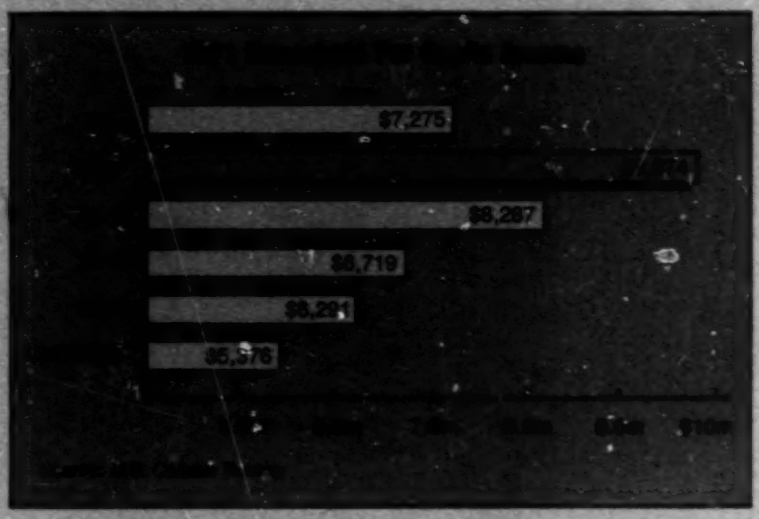
About one-fifth of this group attended or graduated from college, and more women, 5.1 million, than men, 4.6 million, have gone to college. The younger end of this group is more likely to have attended college than the older end. Despite the fact that women have the edge in education, men have the better jobs. Working in professional/managerial jobs are 2.7 million men and 1.5 million women, whereas in clerical/sales there are 1.5 million men and 2.7 million women.

Despite all we read about people working longer, there is a sharp decline in employment at age 65. In both professional/managerial jobs and clerical/sales occupations, male employment falls off by nearly 70%. It declines about the same percentage for women in clerical/sales positions.

But older people still have more disposable income because they have fewer major expenses. The kids are grown and the mortgage on the house is usually paid off. There is a high percentage of home owners among older Americans. As a group, more than 80% of people 55 and older own their own residences, and only the category of women over 70 slips below this figure to a still-healthy 76%.

While the standard picture of the 55-plus group includes a lot of empty nesters, widows and widowers, it's not as bleak as might be assumed. The number of two-person households hovers around 50% for both men and women, and the percentage of men in two-person households increases with age, while the percentage of women in such arrangements decreases. Men are also more likely than women to live in three-person households. Between ages 60 and 64, nearly one-third of the men live with two other people, while nearly one-fourth of the women do.

In their younger days, the 55-plus group practically created the suburbs, and, as might be expected, many, 42%, still live there. About 27% live in cities, and nearly 29% live in non-metro areas, where the percentage increases with age. According to the Census Bureau, 1.4 million, or about 3%, of people 55 and older live in homes for the aged.




*Unless otherwise noted, the statistics are from a special report prepared for* Decisions *by the Simmons Market Research Bureau.*

### Buying habits

Most older people spend between $30 and a $100 per week on groceries. The percentage of men and women spending $30 and $50 a week on groceries increases with age, while the percentage spending $51 to $100 and the percentage spending less than $30 a week both decrease with age. Among men and women age 70 and up, 62% spend between $30 and $50 a week on groceries.

The percentage of people who call themselves heavy coupon users declines during the 60-to-64 age period, but rises the following five years. About one-third of women age 55 to 70 call themselves heavy coupon users, with heavy male users only a few percentage points behind.

About 20% of the 55-plus group say they shop by phone or mail, except in the 65-to-69 age group where that figure drops to about 18%.

A high percentage of both men and women shop in discount stores. Until age 70, more than 80% of women use discount stores, as do more than 75% of men. After age 70, the share falls to 70% of women and 66.5% of men. Men use the Yellow Pages more than women, but the older members of this population group tend to let their fingers do less walking. Among women 55 to 59, 30.8% say they use the Yellow Pages once or more a week, as do 31.3% of the men. After age 70, the usage percentage drops to 17.5% of women and 18.6% of men.

Men are more than five times as likely to own a bank card, such as Visa, than a travel and entertainment (t&e) card, such as American Express. In the 55-to-59 age group, 10% of the men own a t&e card and 51.6% own a bank card. For women in that age group, 4.5% hold a t&e card, while 40.1% carry a bank

card. For both men and women, the ownership figures for bank cards drop by about half after age 70.

### Leisure and recreation

Travel is one area, marketers claim, that is growing among older Americans. Simmons statistics confirm that a healthy percentage of the 55-plus population, particularly among the younger segment, is doing some serious traveling. Among people 55 to 59, 20.3% of women and 17.2% of men had taken a foreign trip in the past three years. In this same age category, 17.7% of the women and 18.9% of the men had taken a domestic air trip in the last year. Travel by people 55-plus drops off by nearly half between ages 59 and 70. After age 70, 9.4% of the men and 10.8% of the women had traveled abroad in the past three years, and 10.3% of the women and 10.8% of men had journeyed domestically by air in the last year.

For both men and women, the older they are, the less likely they are to diet. In the youngest age bracket, one-fourth of the men and nearly two-fifths of the women report being on a diet. After age 70, the share declines to less than one-seventh of the men and slightly more than one-fifth of the women.

More women than men go to movies and, except for the 60-to-64 age group, attendance figures decline as age increases. In the age bracket 55-to-59, 24.2% of women and 18.3% of men had attended a movie in the past three months. After age 70, this falls to 13% and 13.3%, respectively.

Older men tend to garden more than older women. About half of both sexes aged 55 to 59 say they do either indoor or outdoor gardening. After 70, 38% of the women and 42% of the men garden.

### Media habits

Generally, newspaper and magazine readership and radio listening decline with age, while tv viewing increases. More men read news magazines, with business and finance a distant second. The percentage of men reading health magazines dips after age 60 and rises again after age 70. The largest percentage of women read women's magazines, with home/home services and health about even for second.

Cable tv is popular. Between ages 55 and 70, over one-third of the men and women live in homes with cable. After 70, this declines to a little over 27% for both groups. As for tv program preferences, specials, mysteries and feature films, in that order, are most popular with the 55-plus age group. *Michael Cooper*

outs, however, which represent key consumer groups. The largest group, which accounts for 40% of the total, is comprised of the active affluents, who are at the height of their careers and who no longer have family responsibilities. They have the money and opportunity to indulge in luxury travel, restaurants and the theatre. Furthermore, their increased travel and entertainment mean they have more need for fashionable clothing and jewelry, according to Bartos. While they are in relatively good health, she notes, they watch their waistlines and diets, making them good prospects for spas, health clubs, cosmetics and beauty parlors.

"There's an increasing recognition that these people are not sitting in wheelchairs," confirms Ruth Ziff, executive vice president at Doyle Dane Bernbach. Citing research conducted by the agency in 1982, she points out that large numbers of those 50 to 59 think of themselves as experiencing the best years of their lives.

### The future's in Florida

The 55-plus age group is undeniably on the edge of several long-term trends, according to futurists with the Washington, D.C.-based Naisbitt Group. Naisbitt researcher John Elkins told a recent conference hosted by *Prevention* magazine (which targets a 35+ audience) that Florida was the most important bellweather state in the country for pinpointing emerging trends precisely because 17% of its population is over the age of 65.

"Things are happening in Florida," Elkins says, pointing to market trends like the emerging popularity of videotex, the growing concern about health, fitness and medical care, and the high spendable income as glimpses of the future. The older market's penchant for eating out bodes well for restaurants and bars, notes Elkins, adding that their share of food sales in Citrus Country climbed from 16% in 1972 to 52% in 1983.

Greater discretionary income among Florida's retirees, who generally have paid off their mortgages, no longer support their children, and who benefit from pensions, social security payments and interest income, has also helped to create a stable retailing en-

vironment in the state, Elkins pointed out. The older population's interest in new cars, apparel for retirement living, furniture and gardening can be acted on. And, like the baby boomers, convenience products are in great demand among the older population, according to Elkins. Not only did long-lasting and easy-to-keep aseptic packaging first appear in Florida, but the range of services delivered in the state "is just incredible," he adds.

**Percent Change in Population Growth 1990 - 2020**

| YEAR | 18-24 | 25-34 | 35-44 | 45-54 | 55+ |
|---|---|---|---|---|---|
| 1990* | - 14.6% | + 13.5% | + 42.4% | + 11.5% | + 9.7% |
| 2000 | - 2.0% | - 18.1% | + 12.9% | + 40.7% | + 8.7% |
| 2010 | + 15.0% | + 5.2% | - 16.0% | + 14.1% | + 23.1% |
| 2020 | - 7.4% | + 9.1% | + 4.9% | - 16.0% | + 6.8% |

*Source: U.S. Census Bureau* **from previous 10 year period.*

One sign that more and more marketers are beginning to reach out to the Ultimate Society is the growing popularity of older models in advertisements. The Ford Modeling Agency has created a "Classic Women" department to meet the growing demand from ad agencies for older models. The five-year-old division, whose models are used in ads for Pond's Cold Cream, Clairol and Adorn Hair Spray, nearly doubled its business last year alone, according to Theresa Zazzara, director of the department.

Creating marketing strategies and advertising executions that cater to specific needs of the elderly yet do not insult them, can, however, be a tricky problem. Johnson & Johnson, which introduced Affinity shampoo for the over-40 set, is meeting with some negative consumer response. The shampoo has only captured a 2% share of the market and is beginning to drift downward after being on the market for little more than a year, according to Emma Hill, a financial analyst with Wurtheim. "That suggests the consumer is not in love with the product," Hill says. J&J, meanwhile, maintains that Affinity is meeting its expectations, and notes that it expected a limited amount of consumer resistance to Affinity's concept of special conditioning for older hair.

Archway Cookies has found a less overt approach to the age issue is the wiser one. The company, which derives a high percentage of sales from older people, recently abandoned its theme line depicting the difficulty of selling to a tough cookie like grandma in favor of a modernized approach showing grandma and grandchildren together, with the underscore, "kids of all ages love Archway." "The good looking upscale woman that we show in the ads is more in tune with the lifestyles of the over-50 group today," says James McIntyre, national marketing manager.

Finding an advertising approach that sets the right tone and communicates product benefits at the same time can be a painstaking task. Thomas D. Dupont, senior vice president and director of research at Oxtoby-Smith, points out that while older people are an important market to reach, great care needs to be taken in producing commercials that will spark an interest. "You don't communicate to the 65-plus age group the same as you would to someone younger," says Dupont.

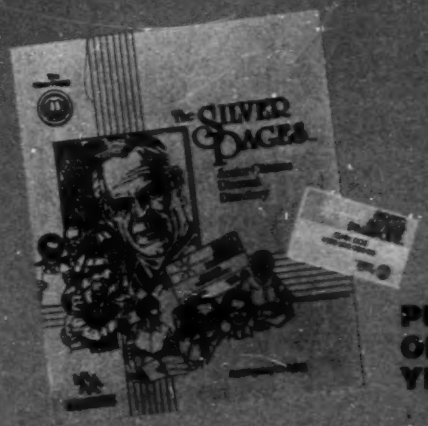
*Archway Cookies finds treating age positively is a far wiser approach.*

Research he compiled on the physiology of aging underscored certain principles that should be kept in mind when designing ads for this market. At the age of 75, for example, only one in seven people has 20/20 vision — even with glasses — and the ability to discriminate color begins to break down. Fast movement can still be easily seen, however. In addition, a fair number of elderly people have a hearing impediment which can obscure spoken words. As a result, Dupont suggests that commercial language should not be sped up to cram in longer product pitches and should not include any tangential information which might interfere with an older person's comprehension of the subject.

By following Dupont's guidelines, Block Drug and ad agency Grey created a far more effective commercial for Polident than the original ad which had actress Martha Raye reminiscing about her career. When the tug-at-your-heart material was replaced by product demonstrations and more movement, the ad scored far higher with its audience.

Despite the special care needed to address the over-55 age group, it is evident that more marketers are recognizing its appeal and opportunities. The host of new products for the older market is overwhelming, including skin treatment products from Revlon, Avon, Estée Lauder, lip treatments from Elizabeth Arden, and Clairol's Silk and Silver hair color, positioned for older women. Increasingly, existing products are being adapted with specific appeals to the 55-plus market. Bufferin, Tylenol, Nuprin and Advil, for example, all have been positioned for both headaches and arthritis. Even the travel market is responding. Both Amtrak and the Alaska Division of Tourism have expanded their reach to the 55-plus market by pointedly including both young and old travelers in their vacation ads.

Among the more venturesome efforts to capitalize on the aging of




## PUTTING A PATINA ON THE YELLOW PAGES

The Yellow Pages are gaining a silver companion guide. Modeled after the standard published directory for shop-at-home customers, the Silver Pages resemble their brighter counterpart, but address the specific needs of the elderly.

The directory, published by St. Louis-based Southwestern Bell, lists display and classified advertising from businesses that provide discounts or special offers to persons 60 or older. It also describes local services such as arts programs, legal counseling and employment programs for senior citizens.

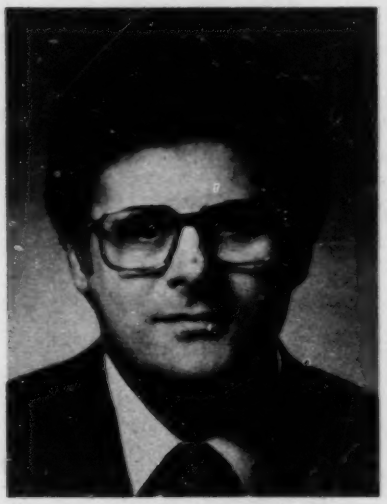
St. Louis is currently the only metropolitan area with Silver Pages, but Southwestern Bell plans to extend its reach from the home base into several other major markets, including Boston, Los Angeles, Denver, Atlanta, Dallas, Tampa, Chicago and New York.

The premiere St. Louis issue, which debuted in January, got off to a good start, carrying 65 pages of national advertising and 188 of local classifieds, according to Ron Jennings, vice president and general manager for Southwestern Bell Media. National advertising is being sold by the National Senior Media Network headquartered in San Jose, Calif. Local space is sold by Ad/Vent Information Services, a sales and marketing arm of Southwestern Bell set to be established in each separate market.

The Silver Pages are mailed to senior citizens free of charge, and can also be picked up at local agencies and organizations supporting the older population's special needs and interests. Through the use of a passport identification card obtained at local outlets such as shopping malls, banks and senior citizen centers, those 60 years or older are entitled to discount rates of at least 5% off participating merchants' regular prices.

America is the Marriott Corp.'s plan to branch out from hotels with life care community centers. It plans to open three of these facilities over the next four years. The move results from Marriott research using statistics from the Census Bureau which indicated a need for communal yet flexible housing for the growing over-55 set, according to director of corporate marketing, Phyllis Bachand. The first center is due to open in Washington, D.C., in two years.

Ford Motors also has studied the unique needs of US'ers. Its five-year effort has centered on uncovering how cars can be better designed for older people. Research, directed by Marilyn King, who left Ford last year to form



**Today's 55-plus population is much more willing to experiment.**

NORMAN GOLDSTEIN
director of marketing services,
Jordan, Case & McGrath

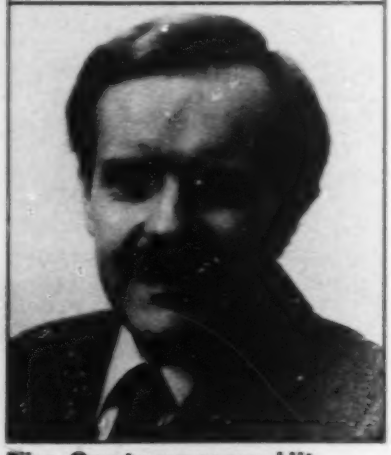
M.J. King & Associates in Ann Arbor, Mich., found a number of areas to be addressed. Older people can have trouble closing heavy trunks and hoods, want power locks and windows for more immediate security, often can't read digital panels without bifocals, can't reach door handles to close the door once seated in the car, and often trip on door sills that are too high. In response to these findings, Ford lowered the sill on its Tempo model, and

Continued on page 148

the second statement is not true. A recent questionnaire sent to advertising agencies, advertisers, research suppliers, and magazine publishers by the ARF Magazine Research Development Committee indicated that this type of research is considered a high priority.

Isn't it about time this type of research is conducted? ■

**RADIO**
**By PAUL THURY**
Spot radio supervisor,
Scali, McCabe, Sloves



## The Contemporary Hit Radio bandwagon

Contemporary Hit Radio has been called the format of the 80's. 1984 has been the year for many stations to make the switch to CHR. A variety of variations on the format have allowed stations to be the second, third, fourth, etc. CHR in a particular market. These stations have decided to jump on the Contemporary Hit Radio bandwagon. Album Oriented Rock and Adult Contemporary formats have been the casualties in many cases to this new format.

KIQQ-FM, in Los Angeles, was one of the first stations to be playing a Top 40 rotation on the FM dial. Mike Joseph started the "Hot Hits" format which as become successful on many of the CBS-FM owned and operated stations. The CHR format has been a hit in the Arbitron ratings. WHTZ-FM, in New York, was number one in their first rating book (Fall '83) with a 6.2 12 plus share. They advertised themselves as the station that went "from worst to first." Contemporary Hit Radio has proved to be a high cumeing format. The Summer 1984 Arbitron in Los Angeles showed that KIIS-FM has almost 2.3 million listeners each week, Monday-Sunday 6 a.m. to midnight.

The music has been a tight rotation of the Top 40 currents and in some cases, a shorter playlist. Personality and presentation have been the variables with each station. WRBQ in Tampa, WHTZ in New York, KKBQ in Houston are stations who started the multi-personality morning drive zoo program. Scott Shannon at WHTZ has been the force behind "The Zoo."

A strong morning drive on these stations has garnered large shares. The presentation of each Contemporary Hit Radio station can be placed in one of three categories. CHR with strong teen appeal, CHR with adult appeal, and CHR which crosses all demographics from 12-49. In New York, WHTZ performs well across all demographics. WPLJ has a strong adult appeal. In Los Angeles, KIIS performs well against all demographics while KKHR is mostly teen oriented with 18-24 spill over. Contemporary Hit Radio appeals to the teens first, then older demographics appear as the format matures.

Album Oriented Rock has suffered over the past few years from lack of product. Loss in shares of audience has made many stations change to Contemporary Hit Radio. In numerous markets, only one AOR has survived. The Adult Contemporary format has evolved over the past few years. Many stations have continued to program music that appeals to the 25-49 audience. In the past year, some adult contemporary stations have changed to CHR in order to garner the huge CHR shares. WKQX in Chicago is one of the stations that has made the change. Their 12+ share has increased. How much current music an adult contemporary station plays has become a heated debate between stations and the buying community.

**"In some buyer's minds, Contemporary Hit Radio means teens and only teens. The Contemporary Hit Radio station with strong adult presentation has proved this bias invalid."**

## CHR shares in top ten radio markets

| **New York** | **12+ share** |
|---|---|
| WHTZ-FM | 6.6 |
| WPLJ-FM | 5.3 |
| WAPP-FM | 2.4 (old format) |
| WKTU-FM | 3.1 (old format |

| **Los Angeles** | **12+ share** |
|---|---|
| KIIS-FM | 10.0 |
| KHJ-AM | .6 |
| KKHR-FM | 3.0 |
| KIQQ-FM | 2.4 |
| KHTZ-FM | 1.7 |

| **Chicago** | **12+ share** |
|---|---|
| WKQX-FM | 3.3 |
| WLS-AM | 2.7 |
| WLS-FM | 2.8 |
| WBBM-FM | 5.0 |
| WAGO-FM | 1.7 |

| **Philadelphia** | **12+ share** |
|---|---|
| WCAU-FM | 4.7 |
| WZGO-FM | 2.3 |

| **San Francisco/ San Jose** | **12+ share** |
|---|---|
| KFRC-AM | 2.6 |
| KITS-FM | 3.1 |
| KWSS-FM | 2.3 |
| KYUU-FM | 3.9 |
| KMEL-FM | 1.6 (old format) |

| **Boston** | **12+ share** |
|---|---|
| WHTT-FM | 6.6 |
| WXKS-FM | 7.5 |
| WZOU-FM | 1.7 (old format) |

| **Detroit** | **12+ share** |
|---|---|
| WHYT-FM | 4.1 |
| WCZY-FM | 4.8 |
| WMJC-FM | 2.8 |

| **Washington D.C.** | **12+ share** |
|---|---|
| WASH-FM | 2.6 |
| WAVA-FM | 4.1 |
| WRQX-FM | 5.6 |

| **Dallas** | **12+ share** |
|---|---|
| KAFM-FM | 2.1 |
| KEGL-FM | 4.3 (old format) |
| KTKS-FM | New Station |

| **Houston** | **12+ share** |
|---|---|
| KKBQ-FM | 10.5 |
| KRBE-FM | 5.0 |

Some stations say they are not pure CHR but Adult Contemporary/Contemporary Hit Radio. They are playing possibly 27-30 songs of the current hits as well as recurrents, and gold. A current song that may appeal to a teen audience would probably not be played on this particular station. A station that is programed in this fashion has been debated as to the true format of the station. In some buyers' minds, Contemporary Hit Radio means teens and only teens. The Contemporary Hit Radio station with strong adult presentation has proved this bias invalid. Each Contemporary Hit Radio station must be evaluated on an individual basis with regard to its demographic skew. Whether a station is Contemporary Hit Radio or Adult Contemporary/CHR will remain to be debated within the radio community.

Stations continue to make the switch across the country. A look at the 12+ shares in the top ten radio markets show that the CHR shares are continuing to grow. Some markets are just starting to feel a surge in Contemporary Hit Radio. The 12+ shares in the Arbitron Ratings show the impact in some of the markets. Inclusion in this example was made by this author. As noted in the previous paragraph, the selected stations may not be in agreement with everyone to be classified as Contemporary Hit Radio Stations.

Total shares in the market continue to grow. In New York, WAPP and WKTU have jumped on the bandwagon with the success of WHTZ and WPLJ. They hope to garner larger audience shares with their own version of Contemporary Hit Radio. In Dallas, the format is just starting to raise its head. KEGL and the new ABC owned KTKS have entered the CHR arena.

The Contemporary Hit Radio format should continue to grow. The timing across the country is right. The popularity of the American family has become vogue again. Communes have gone by the wayside, marriage is again in style. "Mom and apple pie" is the feeling and Contemporary Hit Radio is part of this feeling. Contemporary Hit Radio can span the 12-49 demographic. This format is a format that Mom, Dad and the children can enjoy together. Contemporary Hit Radio, a format enjoyed by the masses. ■

**NEWSPAPERS**
**By GIL FARLEY**
Group media director,
Cunningham & Walsh

## Where's the excitement of newspapers?

In searching for a topic, it occurred to me that just about every conceivable base has been covered in this space over the past few years: SAU's, column inches, Simons & Scarborough, etc., combined with the obvious efforts of newspaper publishers throughout the U.S. to fill request lists of every major agency need.

Why don't we sit back and await the promise of dramatic increases in the use by all national advertisers?

Did I hear someone say it isn't that easy? And why not? All the research is in place. Numbers are readily available. The mechanics of a major newspaper purchase are simpler than in times past. What else can possibly be done to force X's onto the flow chart?

In evaluating this question, it further occurred to me that in this "most personal" of all media, something is missing in the evaluation process: the excitement of newspapers. One need look no closer than an offspring whose name has been duly noted and recognized in the local paper for personal achievement, a wedding announcement or various other personal experiences. These occurrences are not only noted with excitement but saved for eternity. They're personal and the reader relates.

I will speculate and feel safe in doing so, that most national media planners of newspaper space have never read — truly read and possibly never seen copies of most of the newspapers on a recommended list. This is not intended as an indictment of newspaper sales reps, since world class weightlifters would be required to trudge through rain, sleet or snow with twenty copies of a newspaper each day. On the contrary, we have a situation where, to a larger degree, planners/buyers are unaware due to time and logistics of the actual product being purchased. Thus, in this most personal medium, the business decision to utilize or not is highly impersonal.

Magazines solve this problem through the use of complimentary subscriptions while creating life-long enemies among mail-carriers in the locale of media personnel. Let me quickly state that this is impractical to initiate for newspapers for any number of reasons, not the least of which is the inherent danger of floor-collapse throughout the advertising industry.

**"A 'feel' for the personality of the newspaper, its capabilities on a regular basis, would bring buyer judgment into play in the decision-making process."**

However, some variation on this idea would be worthwhile pursuing — possibly a rotating system of a single complimentary subscription to media departments at agencies of major potential.

Thus, firsthand knowledge of a newspaper's vitality and "personality" would be readily available to concerned media people.

A "feel" for the personality of the newspaper, its capabilities on a regular basis, would bring buyer judgment into play in the decision-making process.

Lastly, buyers would have the opportunity to see the end result of their toil in a real-life delivered newspaper — not tearsheets.

It would provide an opportunity for buyers to read — truly read — these newspapers at least on a semi-regular basis. The newspaper reps do their utmost to fulfill this task, but in the end, it is the responsibility of the buyer to familiarize him/herself with the product they're purchasing. ■

# Cars and the young: L'affaire foreign

**Divided into two categories, Japanese and European, the import auto market is favored by everybody's target: the young, educated and affluent. As Detroit follows their design lead, will the line blur between U.S., and import models? Whatever happens, observers predict a healthy volume for imports in 1985.**

Sex appeal. That's the aura that comes almost naturally to imported cars, and the glow domestic car makers would do anything to get. The mystique and cool flash of foreign-born vehicles are increasingly attracting the audience Detroit covets most: the younger, more affluent, and better educated baby boomer. Although the domestic industry hardly had a slouch year — over 7.9 million units were sold last year, up 17% over a strong 1983 — U.S. manufacturers are enviously eyeing the imports.

Last year, sales of cars made outside the U.S. had only a 2% rise in units to 2.4 million models, but a good part of that small gain was due to quota restrictions. While these sales are still just a drop in the tank compared to the mass car market, Detroit is anxious because these buyers are the cream of the crop. As automotive analyst John H. Hammond of Data Resources, Inc. points out, "The import car buyer tends to be affected last and least by the economy."

The signs of imports' popularity are everywhere. Sales hit 2.4 million units last year. Their share of market, which stood at 23.5% at year's end, is projected to hit 24.8% in 1985. Most pronounced, however, is the reaction to this uptick among domestic manufacturers. Ford, for example, is bringing in the new Merkur model, formerly only available in Europe, while GM is

DOONESBURY
by Garry Trudeau
SIR! WAKE UP! WONDERFUL NEWS!
IT SURE AS HELL BETTER BE, HONEY. WHAT TIME IS IT?
IT'S 2 P.M., SIR! GUESS WHAT? WE FOUND A LIBERAL DONOR!
WHAT? ALREADY?
YES, SIR! THE BODY'S ON ITS WAY! SURGERY IS SCHEDULED FOR TONIGHT!
MY GOD! ARE WE SURE HE WAS A LIBERAL?
PRETTY SURE. THEY PULLED HIM FROM A VOLVO.
GBTrudeau
1-21

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**First half 1984 media expenditures (000)**

| Company | Total | Mags | Sunday Mags | Net tv | Spot tv | Net radio | Outdoor | Spot Radio |
|---|---|---|---|---|---|---|---|---|
| Nissan | 29,311.2 | 6,918.1 | $141.0 | 9,651.0 | 9,750.6 | – | 274.0 | 2,576.5 |
| Mazda | 12,994.6 | 6,239.6 | – | 6,010.5 | 729.2 | – | 2.4 | 12.9 |
| Volkswagen | 20,548.9 | 9,249.4 | – | 6,054.0 | 4,820.2 | – | 147.3 | 278.0(E) |
| Audi | 10,517.8 | 4,751.1 | – | – | 5,562.8 | – | 41.3 | 162.6(E) |
| BMW | 9.017.3 | 4,701.0 | 6.2 | 368.3 | 3,529.6 | – | 3.0 | 409.2 |

*Source: Leading National Advertisers; Radio numbers, compiled by RER, courtesy of RAB. Newspaper figures unavailable. (E): Decisions estimate based on RER figure for Volkswagen parent, importer of VW, Audi, and (through 1984) Porsche.*

busy restyling models with the sporty look associated with foreign cars.

The biggest sales boost has been in European models, since Japanese volume is restricted by the voluntary restraint agreements (VRA's), or quotas. For that reason, most analysts divide this artificially controlled market into two segments, European manufacturers and Japanese. Before the Japanese agreed to limit their imports, price alone might have divided the market. However, because of the restraints, the Japanese, once known for their low-priced stickers, have been exporting more of their higher-priced and more profitable cars. Indeed, a number of their 1985 models overlap in price with lower-priced European models.

The restraints have shaped marketing strategy for the Japanese, who still represent about 77% of import sales. Tom O'Grady, an auto analyst with Chase Econometrics, says the restraints have forced a "unique" shift among the Japanese from a market share focus to an emphasis on profitability. He calls self-restraint "a useful game," especially since it allows the larger manufacturers to bring in their more expensive models while keeping smaller makers such as Isuzu from carving up the market. Meanwhile, Mazda, the fourth largest importer, has just joined Toyota, Nissan and Honda with a plan to begin manufacturing cars in the States — models which would look like imports but not be counted as such. Automotive analyst John H. Hammond believes more manufacturers will seek out joint ventures with American companies along the lines of the deal Toyota has worked out with GM. "The problem for smaller manufacturers," he adds, "is that you need a threshold in sales of about 100,000 to 120,000 units to justify assembly in the U.S."

The restraints have not only touched decisions about what models to bring in, but also how much to spend marketing them. Unlike two years ago, when ad expenditures zoomed up as much as 50% to capture some of the pent-up demand, budgets last year stayed at about 1983 levels and even dipped in some cases. The money is also being distributed differently. "We're working very hard on our truck business," explains Toyota's vice president of business planning, Warren Christell, "because it's not under the VRA." Other companies, such as Nissan (still in the midst of its Datsun-to-Nissan name switch) are anxious to keep their logos in front of the public.

**"Luxury is in, gas prices are falling, and the economy is strong."**

The restraints limit Japanese imports to 1.85 million units until the end of this month. What happens after that is anyone's guess. Most analysts believe the restraints will be eased by about 10%. The sure winners of such a move are the smaller manufacturers. The top four sellers don't want to risk the reprisals for flooding the market with product. Rather they are more concerned with safeguarding their joint ventures from local-content legislation. "There are a lot of good reasons for the Japanese to continue using restraints," says David E. Cole, who heads the University of Michigan's automotive transport research department. "For one, they've been the biggest benefiters of the VRA since it's ensured them a higher level of profitability, which they need badly."

Although the Japanese have kept the lion's share of the import market, restraints and all, the big sales boosts last year were in European models. Most analysts believe that situation will reprise in 1985. They offer a flurry of reasons for European favoritism. "Demand is very strong," says J. David Power, who heads the West Coast market research firm, J. D. Power Associates. "This is partly because of their position in the luxury car segment," where 23% of new car sales were last year. "They have a very forceful image of dependability and prestige," he says. At the University of Michigan, Cole believes this prestige reinforces the consumer's need for "individuality." He says "people feel good about spending money on cars," adding, "I wonder if the European imports

couldn't increase their penetration by lifting the price."

Actually, some automakers did indirectly follow this tack. Audi, for instance, saw its sales jump from 47,000 units to 77,000 in 1984, largely because of the introduction of the high-priced Audi 5000 model. Mercedes took the opposite approach. That prestigious marketer introduced a lower-priced model, the 190, designed to bring consumers into the luxury fold at an earlier age. Like their Detroit brethren, the more upscale European importers are courting a younger buyer. Though the European marketers describe their target in much the same terms as the Japanese do — young and well-educated — the crucial difference in income affects the media buy. The Europeans seek a buyer with household income of +$41,000, and rely more heavily on print than the Japanese with an income target of $34,000.

The continued popularity of imports leaves the domestic manufacturers in a bind for 1985, as they strive to build a European-styled car with Japanese-level pricing.

One of the more ambitious moves to win over upscale, younger buyers is GM's Saturn project. The number-one automaker has started a new subsidiary to build a fleet of technologically advanced cars, with the first compact due out in 1988 or 1989. From conception to design, the $5 billion Saturn subsidiary represents a revolution. By utilizing a fully computerized production system that links every aspect of advanced technology from robots to computers, GM is hoping to shave the $2,000 difference between its production costs and those of Japanese competitors. Even a new corporate culture is being coaxed — there are no reserved parking spaces in the lot that surrounds the Saturn building. GM is not alone. Ford's Lincoln-Mercury division is selling a sporty sedan under the new Merkur nameplate, a car targeted to young professionals instead of the traditional 50-year-old L-M customer. "It's getting hard to tell the yuppie-mobiles from the European cars," groans Drexel Burnham's auto industry analyst, David Healy.

Meanwhile, the major manufacturers have largely abandoned the low-priced segment. And it is here that they may leave their flanks wide open. It is in this $6,000 and under niche that Korean manufacturers, not covered by any restraints, are hoping to make their move. Mini-cars, such as the Pony model made by Hyundai, have been selling briskly in Canada. The first Hyundai models, a less expensive version of Dodge-Plymouth Colt, are expected to hit the U.S. in September or October for the 1986 model year. While it is far too soon to predict what buyer reaction these cars will get, there is a lot of industry interest. As Power points out, "With the Japanese upgrading, the market is open for Hyundai to come in without too much direct competition — at least during the first year." Others are more skeptical. Tom Gibson, executive vice president of operations at Subaru, notes, "The first thing they'll have to do is get a dealer body out there. How quickly they can do that, and how extensive the network is, is very important. The fact that the Korean cars are coming isn't the same thing as how fast they will come. Besides, there will be consumer hesitation about a new, untried product. I don't believe they will be a significant factor in 1986."

Market watchers expect these changes to create a more complex, more competitive marketplace. J. David Power believes that projects such as the Toyota-GM joint venture "blur the lines" between an import and a domestic, and may confuse the consumer. "The mystique of imports," he adds, "seems to be less a factor for European cars as well, with the new classification of 'import designed' developing." These changes, he states, will make the task of marketing a greater challenge, or at the very least, a different one. Like many manufacturers, Power projects that such intangible attributes as service will become important selling points. Milt Gravatt, advertising manager of Volvo, agrees: "There's already more competition in terms of 'satisfying the customer,' and not just with the product. We're moving away from an emphasis on the manufacturing, to servicing," he says.

*Nissan hopes to have the name-change program, from Datsun to Nissan, completed in the next 18 months; Mazda targets an upscale audience, with an upgraded model mix.*

In the shorter term, the industry is hoping for a repeat performance of 1984. Some estimates, like Tom O'Grady's of Chase Econometrics, peg total 1985 sales at 10.3 million units, slightly lower than last year "because of consumers' concern over economic uncertainty." Others, such as J. David Power, are certain that the market will mushroom this year to 10.9 million units. Chris Cedergren, an industry analyst, points out that the recession forced manufacturers to close so many plants that last year's 10.4 million units actually reflect "capacity constraints" more than they do consumer demand. "This year," he adds, "we have three new plants opening." These include Chrysler, which will add more than 250,000 units, and GM's joint venture with Toyota and their luxury plant. "These assembly plants will add another 650,000 to 700,000 units to the market by 1986," figures Cedergren. Estimates on the imports' future vary just as radically. J. D. Power Associates is projecting that the new level of restraints will be 2.1 million units, a 13% increase. With European import totals expected to top 600,000 units, the imports' share of the market could top 25% for the first time in several years.

The manufacturers in this report were picked on the basis of 1984 sales. They are the top five Japanese and top five European importers, according to figures compiled by J. David Power.

### Japanese cars

Japanese manufacturers, restricted to 1.85 million units for the year ending March 31, still managed to sell four out of every five imported cars. J. David Power comments, "They haven't really had to push hard in their marketing efforts — in fact, most of the companies have been spending a disproportionate amount of money just keeping their name in front of the public," rather than doing specific model advertising.

Because the profile of a Japanese car owner is so distinct from that of a domestic car buyer, imports must compete most heavily against other imports. This emphasis may change if the quotas are eased, but such a change would also mean a wider breadth of competition as the smaller Japanese

*Subaru promotes its ruggedness.*

manufacturers such as Isuzu start playing for bigger stakes. Already, the shares of the top five Japanese importers fell in 1984, from 1983, when the restraint level increased from 1.68 million units to 1.85 million units last year. The exact difference, though, is difficult to measure, since the restraints aren't based on the model year or the selling year.

Leading the pack is **Toyota**, with 1984 sales of 558,000 units and a 23.3% share of the import market, a slight increase from last year's 555,766 units. Marketing strategy depends on how the new cars fit into the model mix, and for 1985, that means Toyota is upgrading. The focus is on the new Cressida, a compact whose $15,000 price tag matches the Celica. Warren Christell, vice president of business planning, says the target audience for this new model is slightly older and more affluent than the traditional Toyota customer. The company usually attracts buyers from their late 20's to mid-30's earning +$32,000; the Cressida buyer is likely to be in his 40's, with a household income on the plusher side of $35,000. Toyota also has high hopes for MR2, an upscale sporty car ($12,000) due later this year.

**Total car sales (units), top five Japanese and European imports**

| | 1984 |
|---|---|
| Toyota | 558,000 |
| Nissan | 485,000 |
| Honda | 375,000 |
| Mazda | 170,000 |
| Subaru | 157,000 |
| Volkswagen | 101,000 |
| Volvo | 98,000 |
| Audi | 77,000 |
| Mercedes-Benz | 76,000 |
| BMW | 69,000 |

*Source: J. David Power Assoc.*

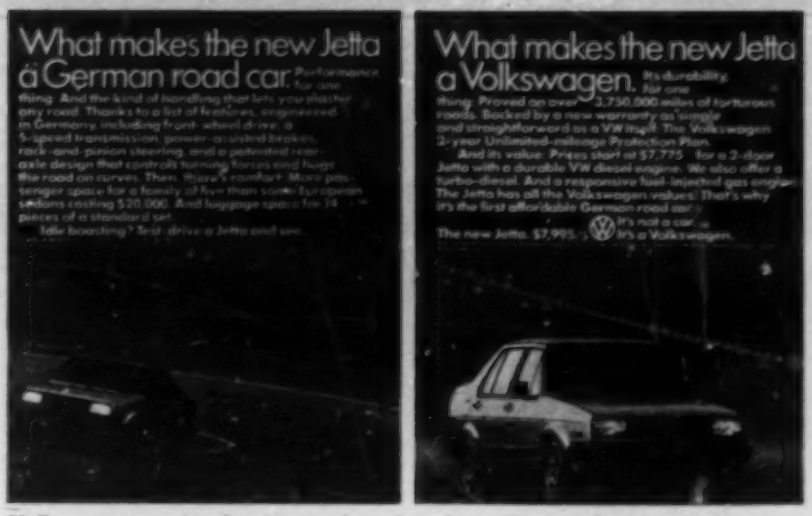
The media mix has remained virtually the same because, overall, Toyota's buyer profile has remained stable, says Christell. Toyota continues to put about 75% of its budget into television, with two-thirds of that going into network. First half 1984 advertising figures indicate the company spent less than the year before — about $40 million compared with $51.3 million in 1983. Nor will the budget get much of a boost this year, unless the restraints are eased by more than 10% (2.0 million units).

However, Toyota is boosting the truck budget, which is separate from the cars. This is being done because Toyota's pick-up truck volume ("The number one small truck in the U.S.," says Christell proudly) isn't limited by the VRA. Even though the vehicles are subject to a 25% customs surcharge, Toyota sold 260,000 units last year — about twice the volume of two years ago. If only the new mini-van Toyota is now marketing was considered a truck, sighs Christell. Spurred into this market by Chrysler's success (200,000 units in the first year), Toyota now offers the mini-van in a passenger and cargo configuration.

**Nissan**, with 1984 sales of 485,000 units and a share of 20.2%, seems content to stay its course as long as the import segment is demand-driven. "It's true that we've decreased our marketing efforts," concedes Jim Thomas, corporate manager of marketing strategy. "We just haven't had to work as hard." Thomas refers to the advertising, still focused on boosting awareness of the name change from Datsun to Nissan, a task he hopes to see completed within the next eighteen months. Perhaps the marketing effort would be better channeled toward Nissan's models. Unit sales last year were

7.6% lower than 1983's 521,902 units, even though, at more than $50 million, Nissan's ad budget is the heaviest among all imports.

Nissan, says Thomas, targets the same demographic as Toyota. The company has been doing well with models such as the sporty compact Maxima and the Sentra ($13,000 and $8,000 respectively), which attract 35-year-olds with incomes of about $34,000. Nissan goes after that audience with a heavy barrage of television — two-thirds of the budget in 1984 was split between spot and network. Thomas feels so certain that Nissan's hold on younger car buyers will outlast Detroit's efforts that the company does little targeted marketing, such as early efforts among Japanese manufacturers to appeal to women. He adds a little smugly, "Detroit's been making little picks at decreasing their average age of over 40, but it takes a lot to move the needle." Until the new Maxima arrives in October, and the new Stanza station wagon comes the following April, Nissan expects 1985 sales to mirror 1984, with the Sentra representing about 40% of Nissan sales.




*Volkswagen worries that its cars have lost their "German heritage" image.*

With the car business fairly well insulated by the restraints, Nissan is trying to boost its share in the highly competitive small truck segment. Last year, the company sold 181,000 units, about a 5% share of the 3.8 million unit market. Thomas sees potential for more sales, especially since the market has expanded from a regional (Southwest) market. "Now pick-ups are being used as an alternative to a second car," he explains. "We find that people are trading off small sporty cars at the low end for a truck."

Most of **Honda**'s marketing efforts have been focused on changing the third largest Japanese importer's prac-


MILEAG
PER GL
61 % of Glamour readers own two or more cars
67 % own a car bought new.
75 % own a domestic car.

tical car image. This desire for upscale polish and dash is one of the main reasons why the company will begin importing a luxury sedan under a new division, Acura, in April, 1986. This new import, explains American Honda senior vice president Cliff Schmillen, will be the first of what will eventually be an entire family of cars. The first shipment of 50,000 will be distributed through a different dealer network of 40 to 50 outlets to underscore the difference between this car and the familiar, smaller Hondas such as the Civic and the Accord. This plan for upgrading the model mix is unlike the strategies of Honda's Japanese rivals, who distribute their upscale models through the same dealers as they do their less expensive cars. Interestingly, Honda's system is almost identical to the game plan for GM's Saturn cars, which will roll out to a distinct group of dealers. "That's the right idea," says Schmillen, "a different dealer for a different kind of car." This sedan will be so distinctive, he boasts, that "the buyers we will be attracting won't be the ones usually attracted to Honda." He believes that Acura will lend itself to comparisons with Audi, Volvo, and the smaller BMW.

**The biggest sales boost is in European cars, since Japanese volume is restricted by quotas.**

In the meantime, Honda imported 375,000 of its smaller cars last year, a slight increase over 1983's 350,000 units. Mostly, Civics and Accords (priced under $10,000 and for the most part under $8,000) appeal to the buyer of a second car — the theme of a recent television campaign. The imports come on top of American production of Hondas in the Marysville, Ohio, plant, where the company has just added capacity for 120,000 Civics to the production of 130,000 Accords. This year, Honda is boosting the budget 10% over 1984's estimated $40 million and placing a greater emphasis on the Accord, the higher-priced model. Almost all the money is spent on television, mostly network, positioning Honda in terms of value. Schmillen is fond of comparing even these smaller cars with BMW "in value," but as yet, the comparison hasn't shown up as a selling point. "Perhaps we've been a little too low key," he muses.

It's been an eventful year for **Mazda** Motors of America (formerly Toyo Kogyo). The company has just announced an agreement with Ford to launch U.S. production of 240,000 cars by 1987. Ford, a 25% owner of Mazda, will get about half the units for sale under its own nameplate, in exchange for the Michigan site. Until then, Mazda plans to continue upgrading the model mix and targeting a more upscale buyer with household income of $35,000. Accordingly, the media mix has shifted out of television, where Mazda spent over half its $31 million, 1983 budget. About half the estimated $30 million budget this year will go into magazines. Senior vice president/general manager Rod Hayden points out that Mazda continues to buy sports programing, but like prime time, "that's not cheap." Advertising stresses the

A Condé Nast Package Magazine. Copyright 1985 by The Condé Nast Publications, Inc. Source: 1982 Glamour SMRB Primary Reader Study

E

GLAMOUR

77 % are principal car drivers in the household.

77 % are responsible for car purchasing (make & model).

93 % of Glamour readers own a car.

*Audi, pleased with the new 5000, hopes the magic will spread.*

"drive and excitement" of the subcompacts.

**Subaru** is in a slightly different position from the two larger manufacturers, who feel most sensitive to the restraints, and from the mid-sized makers Honda and Mazda, who are intent on approaching the American market aggressively. The fifth-ranking Japanese importer has "no political sensitivity," according to John H. Hammond of Data Resources Inc. "Smaller producers like Subaru," he says, "have been most aggressive about adding capacity in Japan. They have to find a way to sell it, and only the U.S. market can absorb it." Subaru ended 1984 with a 6.5% share of the import market, selling 157,000 units. "And we could have sold more," boasts Thomas Gibson, executive vice president of operations. The cars, all subcompacts and mid-size stationwagons, range in price from about $5,500 to over $11,000, averaging slightly over $7,000. Rather than emphasize affordability, Gibson points proudly to the results of a J. D. Power customer satisfaction survey that ranks Subaru second among imports behind Mercedes.

This quality selling point is stressed in its current campaign. Subaru is increasing its marketing budget this year to more than $25 million. Support is split between the new sporty XT coupe, the restyled four-door model and station wagon, which together will comprise about 85% of Subaru's volume in 1985.

## European cars

For European, read German, since that's where four out of the top five European imports come from: Volkswagen, Mercedes, Audi and BMW make up the bulk of the list. With the exception of VW, whose cars range in price from $6,700 to $13,300 but average below $10,000, European imports, including the Swedish Volvo, are considered part of the 2.4 million unit luxury car segment. All told, these luxury Europeans possess a 19% share of that segment. And every economic variable seems to suggest these imports will continue to enjoy the success they did last year: Luxury is in, gas prices are falling, and the economy is strong. Even if interest rates increase toward the end of 1985, the European car buyer is likely to be unaffected — average household income is +$41,000. J. David Power points out that this high income market is "growing at a faster rate than the total car market."

**Volkswagen** is in a slightly different position than its more upscale brethren. For one thing, the American manufacturing arm is having trouble holding its own. Sales of U.S.-built Rabbits dropped from 85,000 in 1983 to about 74,000 last year. For another, the company has just begun battling a longstanding perception that VW is a domestic car. VW's marketing effort emphasizes the German heritage of the cars, a strategy that seems to be paying off. VW once again upstaged runner-up Volvo with unit sales (import only) of 101,000.

At the same time, VW is as eager to upgrade its model mix as every other manufacturer. The company will be placing a greater emphasis on the Jetta notchback model, a configuration that attracts a slightly more upscale buyer than the entry level hatchback. The Jetta models ($7,900) tend to skew slightly younger than VW's overall buyer profile — college-educated men and women between 25 and 49 with incomes over $35,000. The Golf, though slightly lower in price ($6,990), attracts an older audience because, as manager of marketing Dick Marci puts it, "it's a more utilitarian-oriented car, psychographically." Marketing budget levels have stayed somewhat stable at $45 million. The emphasis is split between the Jetta, the Golf (a domestic replacement for the Rabbit), and the GTI, due in the second quarter. "German engineering" continues to be the cornerstone of positioning for these three cars.

| Demographics: | Japanese, | European, | industry average |
|---|---|---|---|
| % Male buyers | 54% | 62% | 59% |
| % Married | 62% | 68% | 69% |
| College grads | 55% | 57% | 43% |
| Professionals | 30% | 31% | 23% |

*Source: Mid-year 1984 model study, cited by Nissan*

Even though Sweden's **Volvos** are priced competitively with some upscale imports (between $13,000 and $23,000), the cars are viewed slightly apart from Mercedes, BMW or Audi. Advertising manager Milt Gravatt explains that though the buyer profiles seem similar, the Volvo buyer actually maintains a very different lifestyle. "Volvo owners are not as hedonistic as BMW owners. They tend to be conservative, rational, and issue-ori-

Continued on page 128

How the Mercedes-Benz 380SE is accelerating the demise of the traditional luxury sedan.

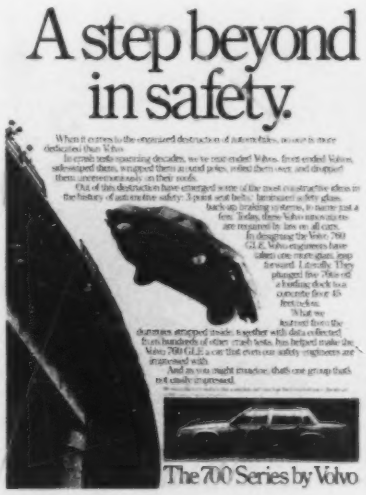
Engineered like no other car in the world

*Mercedes-Benz is putting its weight behind the new 380SE.*

ented." These key differences make marketing much easier. Advertising runs in such vehicles as *The Atlantic* and *The Economist*. In fact, about half of 1984's estimated $18 million budget went into print. The emphasis is split evenly between the low and the high end of the line, where Volvo rolled out a new station wagon this month. Positioning Volvo through the years has been easy, says Gravatt: "We're the one you marry, not the one you date."

1984 was the year **Audi** came of age, putting behind it the memory of earlier failures. The turnaround is largely credited to the spectacular introduction of the Audi 5000, the new top of the line luxury model ($18,000). In a single year, Audi sales leapt from a 1983 total of 47,000 to 77,000. This new model skews slightly older and slightly more affluent than the rest of the line. It actually caps Audi's audience with a new upper limit: Now the Audi buyer, predominately male, is between 25 and 64 with an income ranging from $48,000 to $79,000. This model is helping the company to attract a broader spectrum of buyers.

To achieve this, the budget was substantially increased in 1984. The company spent an estimated $25 million, up some 20% over 1983. However, the media pie was sliced differently. While the budget for magazines remained the same, about $9.5 million, the outlay for television, where all four models (the 5000, the 4000, the Quattro, and the Turbo) are currently advertised, rose sharply. There, the stress is on establishing the entire company. Scott Williams, advertising manager, believes this task will be easier this year than last. "But," he cautions, "we still don't have the image Mercedes, BMW, or even Volvo has." Along with the heavier weight in television goes a broader program selection. "We're going to more prime time. We've been in news and sports and we're staying with that, but 1985 is a different story than 1984." The company is expecting increased competition from Mercedes and BMW.




*Volvo attracts concerned citizens.*

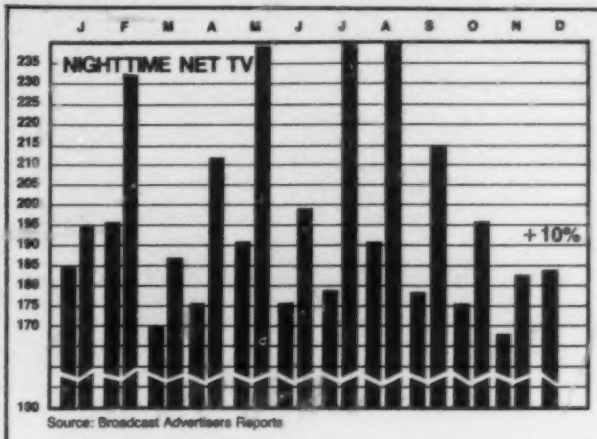
**Mercedes** also had a good year, despite a German workers' strike. Sales increased 6,000 to a total 1984 total of 76,000. Much of the boost is attributed to the new, smaller 190, the successor to the 240D (diesel) model, which represented close to 30% of sales. The introduction of the 190 was a significant strategic move for Mercedes, as the car company positioned itself to a younger — but just as affluent — buyer for the first time. "Theoretically," states Robert Baxter, manager of marketing research, "these buyers are our insurance against the future. They will, we hope, continue to buy Mercedes." Since the introduction a year ago, the bulk of the $30 million budget has shifted to the 380 SE model brought in at the end of 1984. Advertising also supports Mercedes' revamped servicing, under the umbrella "Signature service." Is the company concerned that the 190's success may dilute Mercedes' prestige image? Not at all. The new car is priced comparably to the larger model it replaced (about $23,000). Besides, Mercedes is readying its dealers for the fall intro of a new mid-sized car, the 124.

Bavarian Motor Works (**BMW**) had a good year in 1984. Sales rose 17%, to 69,000 units, and the company is counting on 1985 to be even better. BMW now has nine different models, ranging in price from a modest $18,000 to over $40,000. "The only real competition at that level," says advertising manager Brian Richardson, "is Mercedes, maybe Jaguar." What distinguishes BMW's audience from its competition's buyers is less a matter of money or age than lifestyle, which he characterizes as "entrepreneurial."

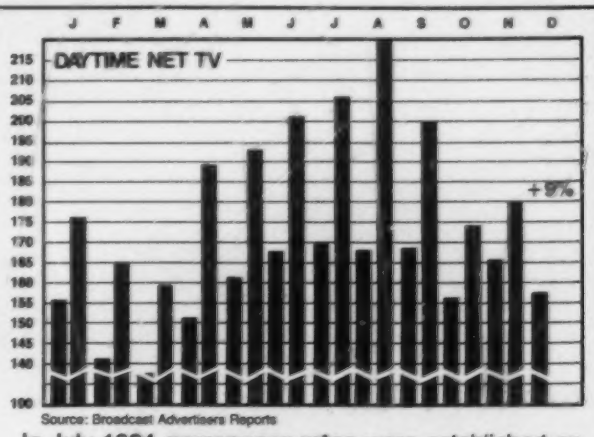
But these self-starters are no longer enough for BMW. The company is altering its strategy to go after a newly defined target, the young family, with fresh mid-sized models such as the 318 and 325E. Richardson believes that target represents a growing market for a +$20,000 car, which will help push 1985 sales past the 80,000 mark. With the new goal is a new approach. The importer has added a corporate advertising campaign in television and mass magazines to make sure the BMW name comes across loud and clear. All this activity has necessitated a bigger budget: 1984's $17 million is twice the 1983 budget, and 1985 is expected to be even higher. *Laura Konrad Jereski*

# MEDIA COST INDEX

Black bars index for 1983; color bars 1984; base year 1977




Source: Broadcast Advertisers Reports

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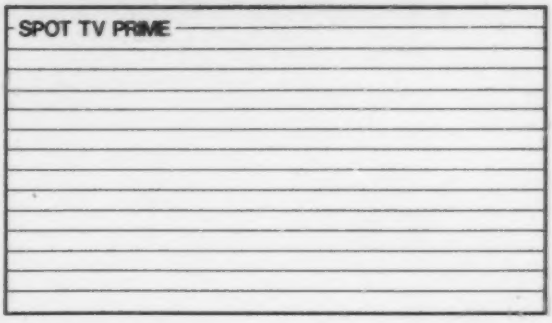
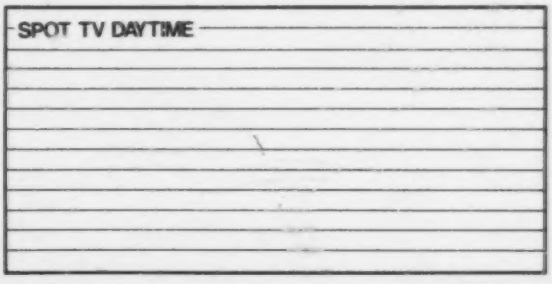
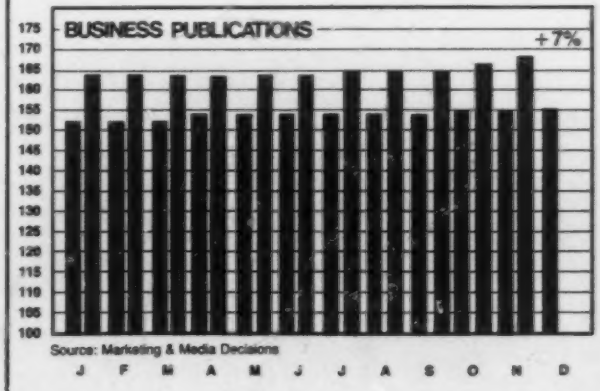



Source: Marketing & Media Decisions

J F M A M J J A S O N D

In July 1984 **newspaper rates** were established on a cost-per-inch basis (SAU's) rather than the traditional cost-per-line system. In order to continue the monthly cost index, a new formula had to be devised by the Newspaper Advertising Bureau to conform to the revised pricing system. This has now been accomplished.

New data for the first 11 months of 1984 have been plotted. For the five months (July through November) the index ranged from 135 in July to 137 in November with a month-over-month change of +9%. Data for the first half were reevaluated. The resulting new series was so close to the previous line that the slight differences were absorbed in the rounding function.

Other media in the cost index show the following:

**Consumer magazines:** holding at +7% since September. **Outdoor:** unchanged from October — up 6%. **National supplements:** holding at +9% since August. **Business publications:** holding at +7% in November. **Network radio:** After a minus posture in the first half, the second half thus far shows more increases than declines. November was up 2%. **Daytime network tv:** November at +9% is the first single-digit, month-over-month increase in 1984. Nighttime network tv: A modest +10% increase in November in sharp contrast to the booming, Olympics-inspired increases throughout the year.

**The Media Cost Index** reflects trends extracted from available sources. This analysis uses standard competitive report sources to develop comparable costs that reflect monthly cost trends by medium. Where industry competitive sources are unavailable, selected cost data from SRDS are sampled.

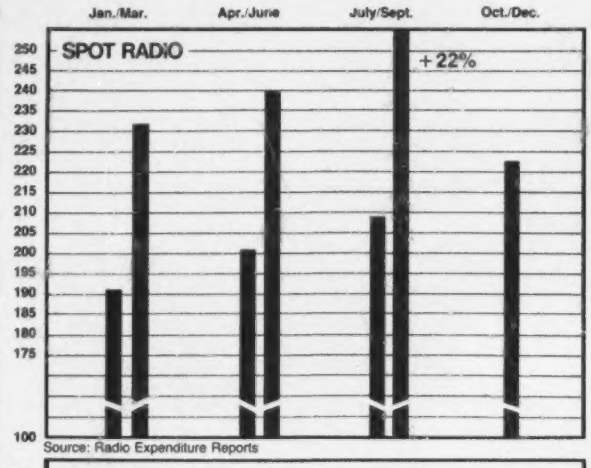
Sources: **Nighttime Network TV** — Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Reports' (BAR) Network TV Service. **Daytime Network TV** — Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service. **Network Radio** — Cost per average 30-second radio announcement from BAR's Network Radio Service. **Spot TV — prime and daytime** — Cost per 30-second spot, Monday-Sunday from BAR's Spot TV Service.

Consumer Magazine estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn. **National supplements** estimate based on published (rate cards) costs of a page, four-color for the national supplements. **Daily Newspapers** estimate based on Newspaper Advertising Bureau report of SRDS costs per agate line of a sample of 788 newspapers weighted to represent the universe. **Business Publications** estimate based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications. **Outdoor Posters** based on estimate prepared by Institute of Outdoor Advertising. **Spot radio** index represents cost of a 60-second spot in the top 100 markets from data supplied to Radio Expenditure Reports by major radio representatives.

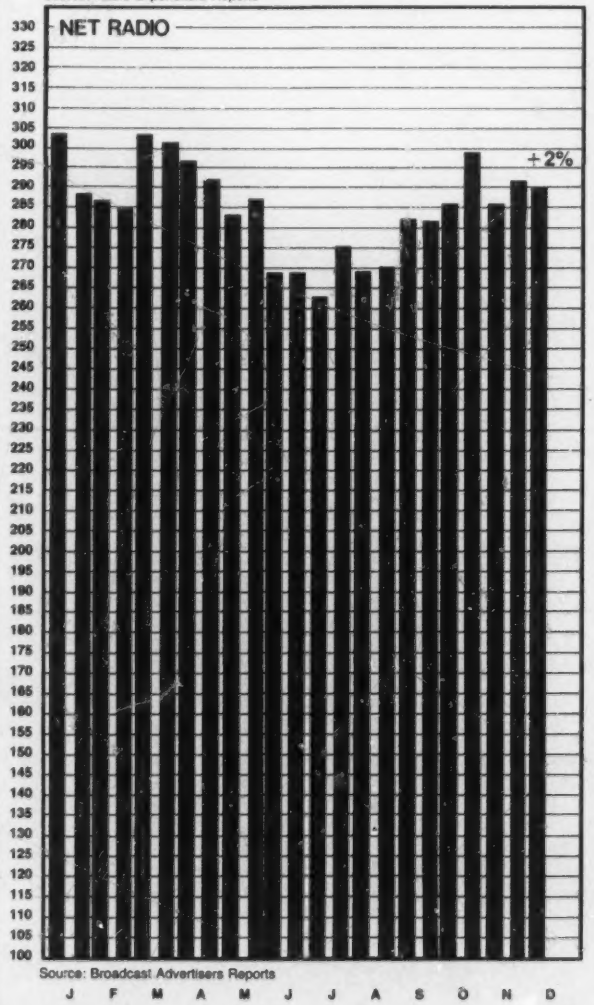
**How to read: Media Cost Index** reflects latest available costs compared with base year 1977. Percent change shows rate of change from the same month in previous year.

# MEDIA COST INDEX (continued)

Black bars index for 1983; color bars 1984; base year 1977




Source: Radio Expenditure Reports

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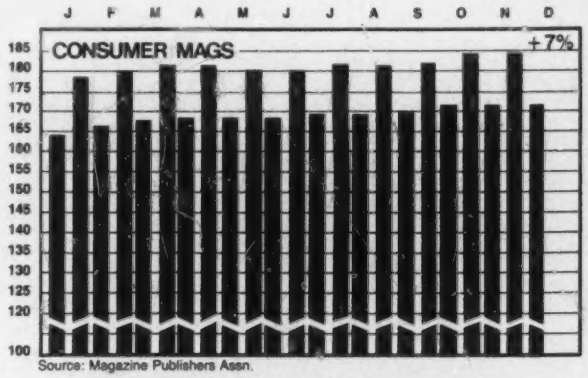
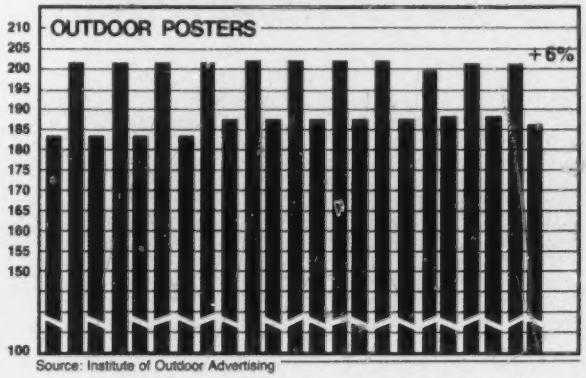
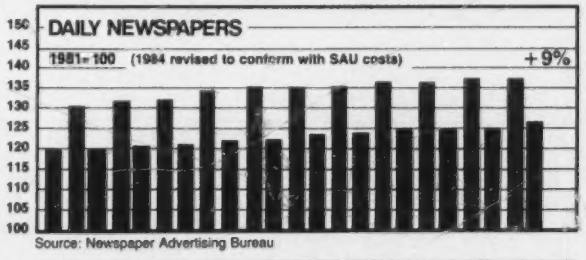


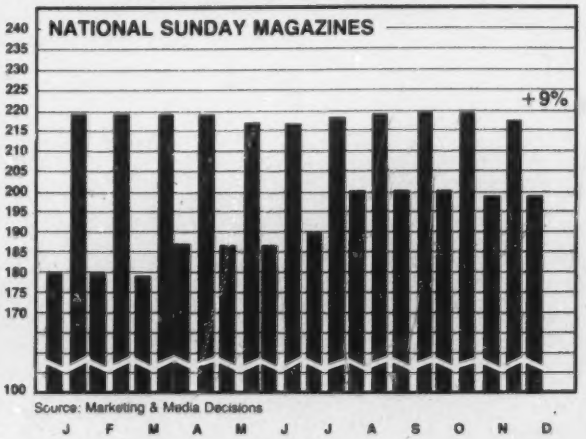

Source: Magazine Publishers Assn.



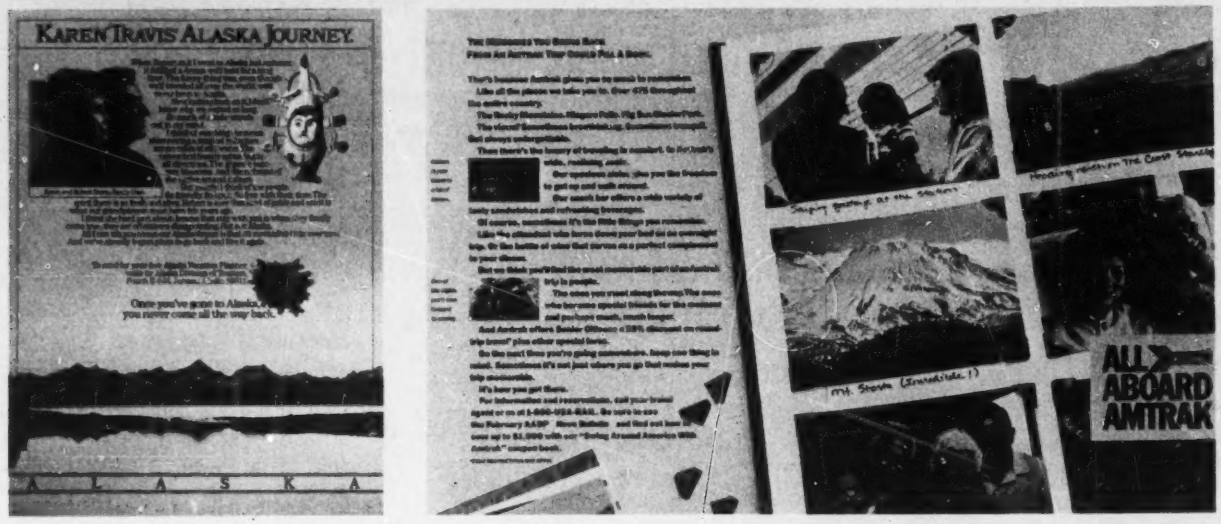

Source: Institute of Outdoor Advertising




Source: Newspaper Advertising Bureau




Source: Marketing & Media Decisions




*Both Alaska and Amtrak highlight older models in ads meant to appeal to the mature group.*

more design adjustments are to be made in future Ford models, according to King. As part of the research, Ford also ran a pilot test offering free power seats and locks to anyone carrying a membership card in the American Association of Retired Persons, which could be joined on the spot for $5.

Not to be left behind, Sears is targeting the 55-plus market with its recently-formed Mature Outlook Club, which offers free home evaluations through Coldwell Banker; portfolio analysis from Dean Witter Reynolds; discounted insurance from Allstate; and travel packages offered at savings through Greyhound and Budget Rent-a-Car. Members also receive a bimonthly publication plus bimonthly newsletters. In its first year of operation, Sears has attracted over 300,000 enrollees.

"The 55-year-olds today are not like the 55-year-olds ten years ago," notes Bill Strauss, executive director of Sears' Mature Outlook Club. "We created this club because our research showed that they shouldn't be overlooked. We found that not only are they the fastest growing group in America, but that they already represent 21% of the population. And they have 68% of all money in money market funds and 80% of all savings," Strauss points out. He adds that Sears' research shows that one-third of the households in America are headed by a person 55-years or older.

Campbell Soup, in addition, is seeking to be "more sensitive to the senior's market," according to Tony Adams, director of marketing research. It already has expanded its low-sodium line from three to eight varieties and has improved the taste of those soups to retain good flavor in the absence of salt, Adams says. But look for more.

**"There's an increasing recognition that these people are not sitting in wheelchairs."**

RUTH ZIFF
executive vice president,
Doyle Dane Bernbach

Campbell's has just completed an exhaustive analysis of the market, its first since 1980, and the findings, Adams indicates, are fascinating. "The key difference from the last time we measured them is that they are a lot more active. They're developing new skills, taking up pottery, learning a new language. In fact, they are beginning to look more and more like the singles market. They are interested in fitness and nutrition and they are eating lighter and healthier. And like the 'yuppies,' they want convenience. They want single-serving packages, and they are using the microwave not just to reheat but to cook meals," says Adams. He notes that the research is so fresh that definitive plans have not been drawn up yet to cater to these new-found needs.

### Maturity media take on new life as interest grows

The media, too, are beginning to feel the effects of the growing interest in the over-55 audience. Prominent in this trend are several older-targeted publications that approach encroaching age with a positive viewpoint. Articles on healthy eating, luxurious travel and retirement housing options are decidedly upbeat. Even the "seven sisters" of magazine publishing are preparing for the coming of this new generation. While most still cater to the heart of the baby boom age, increasingly the publications are casting an eye forward

# The Money Saver™

## DELIVERS THE 50 AND OVER MARKET IN A SPECIAL SEPTEMBER '85 "BREAKFAST SAVINGS" ISSUE

50 and over consumers consider breakfast their favorite meal of the day. In fact, 90% eat breakfast regularly. They start their days off right by getting a greater amount of nutrients at breakfast than at any other meal. 50 and over consumers look for the best combinations of foods to make breakfast both nutritious and appealing since studies indicate taste is most important to this audience.

"The Money Saver" is a co-op couponing vehicle reaching 11.5 million members of the AARP, the prime spending core of the 50+ market, through a direct mail publication they read, respect and have paid to receive. Research reveals this segment of the market uses a wide variety of breakfast foods:

| BREAKFAST FOODS | Total Adults | 18-49 | "The Money Saver" Audience |
|---|---|---|---|
| Decaffeinated Coffee* | 39.1% | 34.3% | 50.5% |
| Coffee Creamers | 23.2% | 21.9% | 50.5% |
| Artificial Sweeteners | 28.2% | 26.3% | 32.9% |
| Hot Cereals | 51.1% | 50.0% | 55.3% |
| Cold Cereals | 88.0% | 88.6% | 87.9% |
| Margarine | 89.5% | 89.2% | 91.9% |
| Tomato/Vegetable Juice | 36.7% | 35.7% | 40.7% |
| Cranberry Juice | 17.4% | 15.7% | 26.7% |
| Egg Substitutes | 3.2% | 2.6% | 4.5% |

Source: MRI, 1984
*SMRB, 1984

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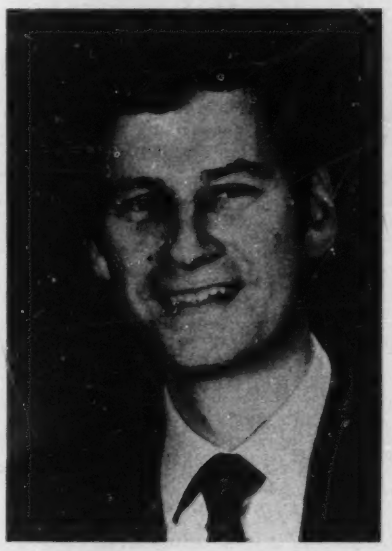
to the nation's aging population. Older role models such as Raquel Welch and Marlo Thomas are more prevalent than yesterday's Cheryl Tiegs.

*Modern Maturity*, the bimonthly publication from the American Association of Retired Persons, now has a circulation of 10.5 million, an increase of 1.2 million over 1983. Ad pages for the bimonthly increased 15% in 1984 over 1983 to 274 pages, and have grown at a double-digit rate every year since 1981 when the magazine began to accept advertising.

Whitney Communications' *50 Plus*, which went through an uncertain phase as the company divested itself of its other magazine properties, has benefitted from a revived commitment from its parent. Last year it netted a 25% ad page gain for a total of 420 pages. Circulation has shot up from 290,000 in 1983 to 405,000 as of March, 1985, according to publisher John Prescott. *50 Plus* was one of the first publications to recognize the changing attitudes of its market. The magazine was originally called *Retirement Living*, but was repositioned in 1978 with the new title "because we felt it was stalled and plateaued with dull and stodgy informa-



**"You don't communicate to the 65-plus age group the same as you would to someone younger."**

THOMAS DUPONT
senior vice president,
Oxtoby-Smith

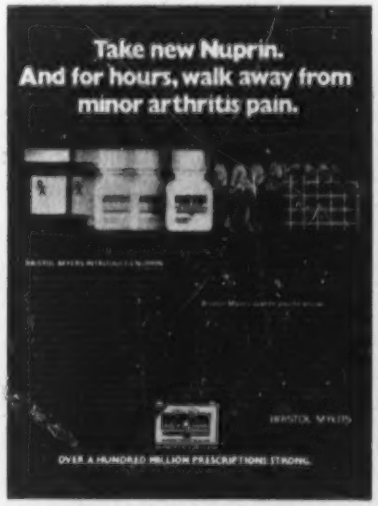
tion about retirees," says Prescott. "This age demographic doesn't die or shrivel up — it blossoms."

The publishing trend has spread into the regional field. What was first a regional newspaper for older people living in Florida has, in six years, sprung into a glossy magazine called *Golden Years* with 500,000 in circulation and 280 advertising pages. According to estimates from publisher Steven Hittner, based in Melbourne, Fla., ad pages are projected to hit 437 this year.

Adding fuel to the publishing fire is last year's creation of a national advertising representative for similar regional publications. The San Jose-based organization, called the National Senior Media Network, represents 40 publications with a combination circulation of 1.8 million. A sign of its growing strength is the 30 pages of national advertising sold by the network in the first 20 days of January, according to Robert Thompson, president. Some of the advertisers include Ozark Airlines, Campbell Soup, Bristol-Myers, and General Foods.

*Campbell Soup ads prove it's sensitive to the senior market.*

The mature market is gaining steam in the broadcast arena, too. CBS is making sales presentations pointing up the strength of the older market's spending power against specific product categories. Dave Poltrack, vice president of research at CBS, finds that advertisers are beginning to ask for age demographics beyond 18-49 to 25-54, a move he's convinced is wise. "An analysis of product consumption pat-




*Reaching out to older market, Nuprin promotes arthritis relief.*

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When you want to reach those neglected midwestern "Grumpies," Home & Away Magazine delivers a loyal buying audience of 1,400,000 in nine mid-American states. And, because Home & Away Magazine is regional/metro in area circulation, you can "test your target markets," rather than walking into the ocean until your hat floats!

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> **Things are happening in Florida, where 17% of the population is over the age of 75.**
>
> JOHN ELKINS
> researcher with
> Naisbitt group of futurists

terns indicates that 95% of all products advertised on television would be better positioned against the 25-54 age group than they would be against 18-49, but the reality is that as many are using 18-49 as are using 25-54," says Poltrack. He is, however, optimistic that a computerized audience analysis system being introduced by Nielsen will make it easier for advertisers to judge better the accuracy of age targets.

Joining forces to bring about further awareness of this age group's tremendous buying power is radio's 35-64 Committee, which has been developing market research to prove the group's clout. "We formed this committee for a very simple reason. This is the most misunderstood group of consumers in America," says Maurie Webster, chairman of the 35-64 Committee and president of his own company, Webster Communications, Inc.

Samuel Shao

*Elkins tells of coming trends.*

All of this is just the beginning of what promises to be a revolution in the way marketers and the media address the consumer marketplace. With life expectancy continuing to increase, from 54.1 in 1920 to 73.2 in 1980, and with the baby boomers projected to double the 55-plus population segment by 2020, the influence of this group will be felt at all levels of society. Any marketer not paying the Ultimate Society the respect it deserves has a lot of homework to do.

*Rebecca Fannin*

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